

Detail of Timeline

SEPTEMBER

Social Security Notice to Review Eligibility for Extra Help (SSA Form 1026)

Notice from Social Security asks some people to complete and return an enclosed form to see if they still qualify for Extra Help. People must return the form within 30 days or their Extra Help may end.

Loss of Deemed Status Notice (11198)

● **GREY** notice from CMS tells people they no longer automatically qualify for Extra Help.

EARLY OCTOBER

Change in Extra Help Copayment Notice (11199)

● **ORANGE** notice from CMS tells people they still automatically qualify for Extra Help, but their copayment levels will change.

OCTOBER

Plan Marketing Materials

Plans start sending marketing materials on October 1.

Plan Annual Notice of Change (ANOC) and Evidence of Coverage (EOC)

Plans send an ANOC and EOC to all enrollees outlining any coverage or cost changes for the coming year by October 31.

Plan LIS Rider

Plans send people who qualify for Extra Help an LIS rider telling them how much help they will get in 2010 towards their Part D premium, deductible, and copayments by October 31.

“Medicare & You” 2010 Handbook

Mailed to all Medicare households each fall.

Notice of Creditable Coverage

Employer/union and other group health plans must tell all Medicare-eligible enrollees whether or not their drug coverage is creditable before November 15 each year.

LATE OCTOBER/EARLY NOVEMBER

Reassignment Notice (11208 & 11209)

● **BLUE** notice from CMS tells people that they will be reassigned to a new plan either because their current plan is leaving the Medicare Program, or because their current plan's premiums will no longer be fully covered by the Extra Help.

LIS Choosers Notice (11267)

● **TAN** notice tells people who qualify for Extra Help and chose a plan on their own that their plan's premium is changing and they will pay a premium in 2010 unless they join a new plan.

Plan Non-Renewal Notice

Plans that are leaving the Medicare Program send notices to enrollees by November 2.

NOVEMBER 15 – DECEMBER 31

Fall Open Enrollment Period

People who are eligible can add, drop, or switch Part C and/or Part D coverage.

Social Security Part B Income-Related Premium Adjustment Notice

Notice tells higher-income consumers about income-related Part B premium adjustments. Includes information in December BRI notices.

Social Security LIS Redetermination Decision Notice Begins

Social Security starts mailing notices about whether people still qualify for Extra Help for the coming year.

LATE NOVEMBER

Social Security LIS and MSP Outreach Notice (SSA Form L441)

Informs people who may be eligible for Qualified Disabled and Working Individual (QDWI) about Medicare Savings Programs and the Extra Help.

DECEMBER

Social Security Benefit Rate Change (BRI) Notice

Notice tells people about benefit payment changes for the coming year due to cost of living increases, variations in the premiums that are withheld, etc.

JANUARY 1 – MARCH 31

General Enrollment Period

People who are eligible can get premium Part A and/or get Part B.

Medicare Advantage (MA) Plan Open Enrollment Period

People who are eligible can add, drop, or switch their Part C coverage, but they cannot drop or add Part D during this period.

BEGINNING IN MAY

Social Security LIS and MSP Outreach Notice (SSA Forms L446, L447 & L448)

Notice from Social Security tells people about Medicare Savings Programs and the Extra Help.

ONGOING NOTICES MAILED DAILY

Deemed Status Notice (11166)

● **PURPLE** notice from CMS tells people that they automatically qualify for Extra Help.

Auto-Enrollment Notice (11154 & 11429)

● **YELLOW** notice from CMS tells people with Medicare and Medicaid that they will be automatically enrolled in a drug plan if they don't enroll themselves or decline coverage.

Facilitated Enrollment Notice (11186 & 11191)

● **GREEN** notice from CMS tells people that they will be automatically enrolled in a drug plan if they don't enroll themselves or decline coverage.

FBDE RDS Notice (11334)

Tells people with Medicare and Medicaid who already have certain creditable drug coverage from an employer/union that they automatically qualify for Extra Help and can join a Part D plan if they wish.

ANNUAL CASEWORKER CALENDAR



A Pocket Guide to
Understanding Beneficiary
Notices and Options

2009 – 2010



Annual Caseworker Calendar—Understanding Beneficiary Notices and Options

CMS Product No. 11332-P

